HyperFind Query Setup for Agency Administrators

eSTART
State of Alabama

HyperFind Query Setup

HyperFind Queries are used to filter and retrieve lists of employees who meet a specific set of criteria, for example, all employees in a specific agency or division. In this example, we will create a query to retrieve all employees in the agency for division 0000.

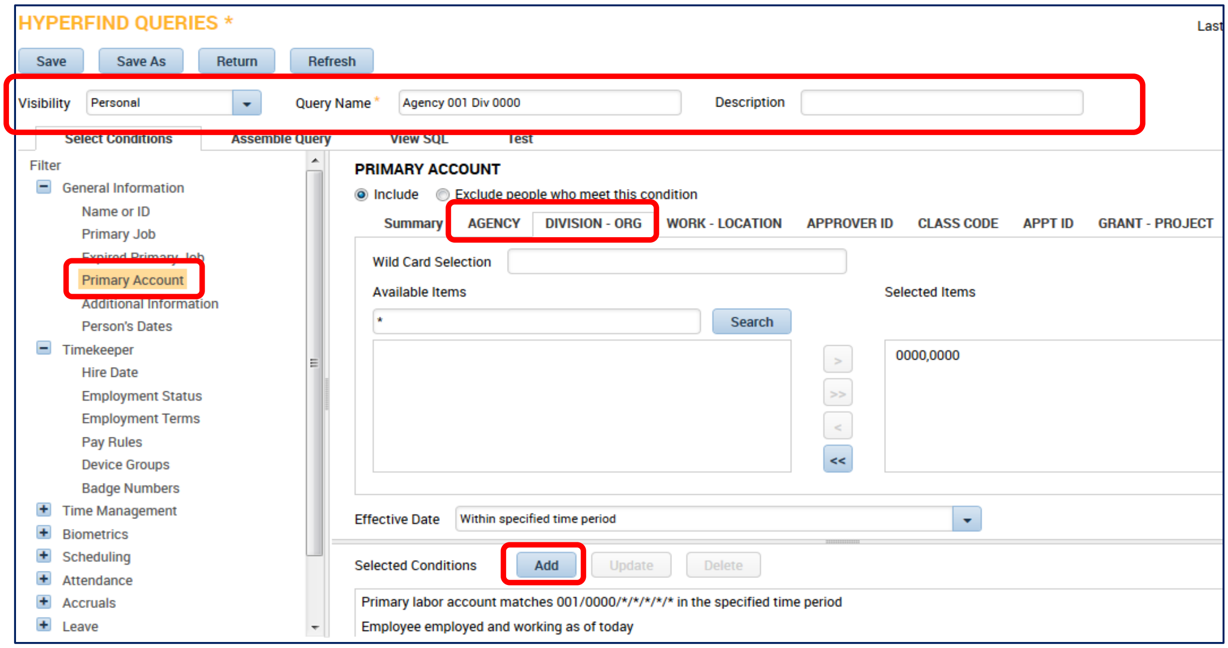
1. From the **Related Items** pane, select **Setup**, then select **HyperFind Queries**.

2. Select the **New** button. The **HyperFind Queries** screen displays.

3. Select **Personal** from the **Visibility** drop-down.

NOTE: Ad Hoc creates a temporary query. **Personal** creates a permanent query, visible only to the person creating it.

4. Enter the name of the new query in the **Query Name** field. The **Description** field is optional.



5. Select **Filters>General Information>Primary Account**.

6. Select the **Agency** tab. Click the **Search** button for the **Available Items** field. The agency should display in the field. Highlight the agency, then select the right single arrow button. The information will be placed in the **Selected Items** field to the right.

7. Select the **Division–Org** tab.

8. Enter all or some portion of the division-org number. Click the **Search** button for the **Available Items** field. A listing of **Division-Orgs** displays.

9. Choose **0000** from the list, then the right single arrow button. The information will be placed in the **Selected Items** field to the right.

NOTE: Hold down the **CTRL** key to select more than one division-org.

10. From the **Effective Date** drop-down, select **Within specified time period**.

11. Select **Add** button. The condition is added to the **Selected Conditions** window.

12. From the **Filters** menu, expand the **Timekeeper** category. Select **Employment Status**. The default fields are **Active** and **As of today**, so no change is needed. Select **Add Condition**. This will ensure that only active status employees will be returned by the query.

13. To test the query, select the **Test** tab. A listing of employees should display.

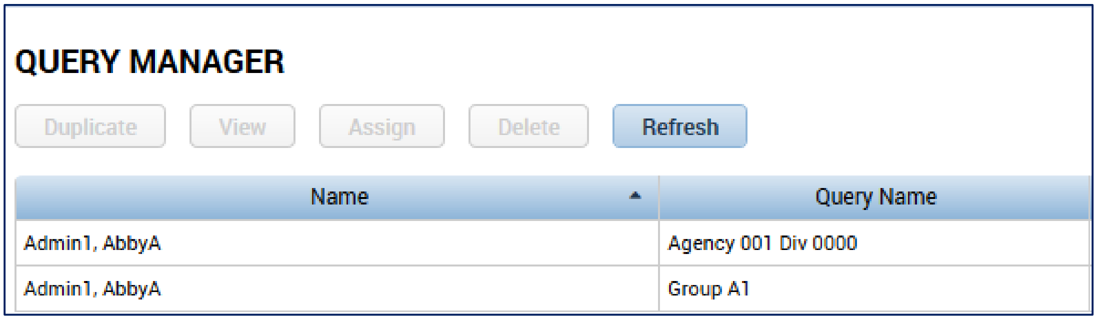
14. If correct, select **Save**. The new hyperfind will now be available from any Show drop-down.

NOTE: HYPERFIND in the upper left-hand corner will display as *HYPERFIND QUERIES in orange font until saved.

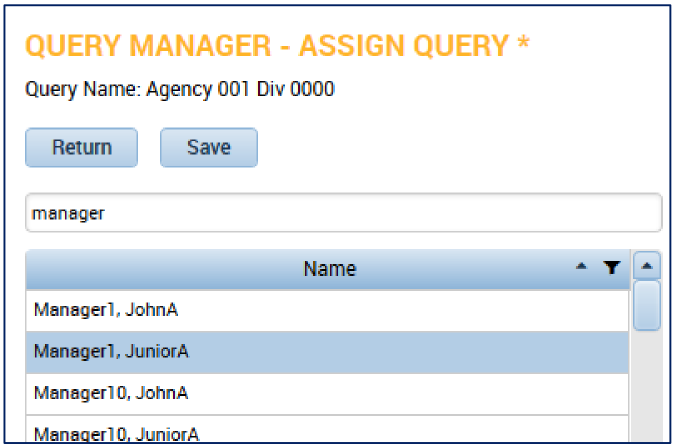
Assigning a Personal HyperFind Query to Another Person

A personal HyperFind Query may be shared with others, but must be assigned.

1. From the **Related Items** pane, select **Setup**. Then select **Query Manager**.



2. Your list of personal hyperfind queries displays. Select the query to be assigned, then the **Assign** button. The **Assign Query** window displays with a list of available names. A **Search** field is available to narrow the search, if needed.



3. Select the desired name.

NOTE: Hold down the **CTRL** key to assign the query to more than one person.

4. Select the **Save** button. The **Query Manager** screen displays in order to view the assignment.

The assigned person now has access to the HyperFind from any of their **Show** drop downs.